

# Step by step checklist

## Introduction

This is a simple checklist which you may find useful as a reminder of what needs to be done after someone has died. Some of the arrangements will need to be done by the executor or administrator of the estate and others can be done by family or friends.

Please remember that this information is just a guide, and not all of the details will apply in every case.

You will find more information on our website: **[www.bereavementadvice.org](http://www.bereavementadvice.org)** or please call us on: **0800 258 5556** to discuss your individual circumstances, to find any telephone numbers you need or if you have any questions.

To help you when filling out forms and writing letters, it may be useful to make a list of some of important reference numbers and information, such as the deceased's date and place of birth and marriage, National Insurance number and tax reference numbers.

<b>Registering the death</b>	<b>Complete</b>
Contact the doctor (GP) or hospital about obtaining the Medical Certificate of Cause of Death OR Contact the coroner's office to find out when you may be able to register the death.	
Telephone the Registrar of Births and Deaths to make an appointment to register the death.	
Complete the Notification or Registration of Death (BD8) form that you were given by the Registrar of Deaths.  This will inform every department using the National Insurance number of the death, but it is advisable to telephone appropriate pensions, benefits and tax offices as soon as possible to avoid inadvertent over-payment of pensions/benefits.	

<b>Arranging the funeral</b>	<b>Complete</b>
Contact a funeral director to discuss the arrangements you want to make for the funeral and your religious or spiritual adviser, if appropriate.  The Will may contain specific requests for the funeral, so it is important to check this.	

<b>Who you need to inform</b>	<b>Complete</b>
Tell family members and friends about the death.	
Employer or educational establishments.	
Health professionals. You will also need to cancel any outstanding hospital, dental, podiatry or other health related appointments.	
Agencies providing care such as social services, home carers, meals on wheels and day centres.	

<b>Financial Organisations</b>	<b>Complete</b>
Banks / National Savings / building societies.	
Insurance companies (e.g. life, buildings / contents, medical, car, travel).	
Pension providers.	
Credit card/store card providers.	
Any other financial institutions must be informed so that any accounts solely in the deceased's name can be frozen to prevent fraud.  You should also inform companies /organisations with joint accounts, although these should normally still be accessible by the other joint holder.	

Property and utilities	Complete
Mortgage provider.	
If the deceased lived in rented accommodation, inform the local authority, housing association or private landlord.	
Buildings and property insurance companies to ensure continued cover especially if the property is left unoccupied.	
Utility companies (electricity, gas, water and telephone) and arrange transfer of account details if necessary.	
TV / internet companies.	

Government offices	Complete
Pensions Service or Jobcentre Plus to cancel any benefits to the deceased or their carer. To find out more, you can call us for advice and contact details on: <b>0800 258 5556</b>	
Inland Revenue to deal with tax and Child Benefit payments (if applicable).	
Local government offices that provide services such as the Electoral Register, housing benefit, council tax office, bus pass, disabled parking permits, library membership.	
The DVLA and the insurance company if the deceased owned a car or held a driving licence.	
The Passport Agency.	

Other contacts	Complete
Arrange redirection of post if necessary and reduce the burden of any unwanted mail by registering with the Bereavement Register.	
Clubs / membership organisations/social groups.	
If the deceased held a firearms licence for work and/or recreational purposes, please contact your local police station.	

Dealing with the estate	Complete
Find out if the deceased made a Will and where it is located. It may be at the deceased's property or their solicitor may have a copy. Please call us if you cannot find the Will and we will be able to advise you on the next steps.	
If there is no Will, you will need to decide who will sort out the deceased's estate and they will need to contact the Probate Registry to apply for Letters of Administration.	
Find out if probate is needed. If it is, obtain the Will, find out who the executors are and inform them of the death if they don't already know.	
Gather any documents relating to financial affairs and property ownership. If there is a Will the executor should be responsible for this.	
The executor or administrator will need to decide how to go about the probate process and whether to use a professional or undertake the administration themselves. For more information on the options available, please call us on <b>0800 258 5556</b> .	